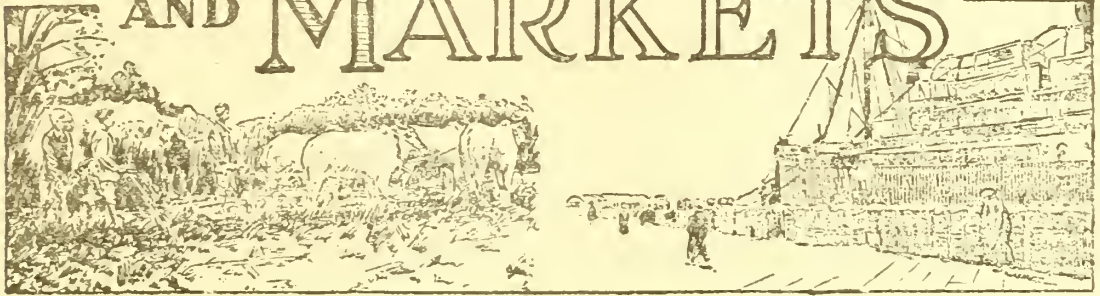


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# FOREIGN CROPS AND MARKETS



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## FEATURE ARTICLE

BREAD GRAIN CONSUMPTION AND TRADE IN BRITISH ISLES

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## L A T E C A B L E S

United Kingdom budget proposal would change the duty on rice imported in the husk from 10 percent ad valorem to 2/3 penny (1-1/3 cents) per pound as from April 16. (Agricultural Attaché E. A. Foley, London, April 16, 1935.)

Chinese cotton textile situation improved during March due to more favorable price tendencies in cotton and yarn and slight improvement in confidence regarding financial conditions. Mill activity is about 80 percent for Chinese mills and for Japanese practically full rate. (Agricultural Commissioner O. L. Dawson, Shanghai, April 15, 1935.)

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## BREAD GRAINS

Summary of recent information

The first official estimate of the area sown to winter wheat in Yugoslavia, placed at 5,345,000 acres, indicates a gain of about 3 percent over the winter acreage sown for the 1934 crop. This brings total winter seedings as estimated for 21 Northern Hemisphere countries, not including Russia and China, to 156,963,000 acres as compared with 153,861,000 acres sown by the same countries last season. Despite frost damage to winter cereals in Rumania crops were reported to be in good condition on April 1, according to a cable from the International Institute of Agriculture. The damage was placed at 5 percent in Transylvania and the western part of the Danube plain, 10 percent in Moldavia and the eastern Danube plain, and 20 percent in Bessarabia.

The estimated acreage of winter rye in Yugoslavia is placed at 544,000, a gain of only 7,000 acres over the sowings for 1934. Estimates for 14 countries now total 42,586,000 acres as compared with 42,383,000 acres sown in the winter of 1933-34.

Oriental wheat marketsChina

Flour prices advanced on the Shanghai market during the week ended April 12, as a result of short stocks and higher quotations on foreign wheat, according to a radiogram from the Shanghai office of the Foreign Agricultural Service. While mills were interested in buying foreign wheat for delivery in May or early June, prices were too high in relation to flour. The wheat supplies of several mills will probably be exhausted about the third week in May. In view of low flour stocks, a premium of 5 cents per bag was being paid for spot delivery. The demand for flour continued firm, especially from Tientsin.

Prices of wheat, c.i.f. Shanghai duty included, were quoted as follows: Australian (New South Wales) for May delivery 89 cents per bushel, Argentine for June and July delivery 88 cents. Domestic flour for April delivery was 92 cents per bag of 49 pounds, May delivery 91 cents. Australian flour, c.i.f. Hongkong, was \$3.32 per barrel of 196 pounds.

Tientsin flour statistics for March were reported as follows: Production 22,500 barrels; imports from Shanghai 270,000 barrels, from other countries 1,500 barrels, total 271,500 barrels. Stocks, placed at 147,000 barrels on March 31, continued to decline and were below normal the last of

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the week. Tsinan flour production during July-March totaled 6,365,000 bags as compared with 5,154,000 bags produced in the corresponding months of 1933-34. This flour is made entirely of domestic wheat. Imports of flour into South Manchuria during February were reported as follows: Japan 206,700 barrels, Australia 226,186, Chosen 683, total 433,569 barrels.

Japan

Prospects for the importation of United States wheat into Japan were still unpromising on April 8, according to information from Consul General Garrels at Tokyo. Wheat stocks on April 1 were normal, and mills were operating at almost full capacity as a result of the strong demand for export delivery. In spite of a recent improvement, domestic demand has not been so strong this season as in 1933-34. Wheat at the mill on April 1 was quoted as follows: Western White, No. 2, \$1.24 per bushel; Canadian, No. 1, \$1.26, No. 3, \$1.18; Australian \$1.07; domestic standard \$0.88 per bushel. Portland wheat, c.i.f. Yokohama, was 91 cents per bushel, duty and landing charges excluded. Domestic flour at the mill was 97 cents per bag of 49 pounds.

Wheat imports into Japan during February with 1934 comparisons in parentheses, were as follows: United States 0 (765,809 bushels), Canadian 202,800 (190,086), Australian 1,169,800 (928,020), Argentine 73,800 (0), total 1,446,400 bushels (1,884,625). Imports of wheat from July 1, 1934, to February 28, 1935, totaled 11,129,000 bushels as compared with 10,373,000 bushels reported for the corresponding months of 1933-34. February exports of flour amounted to 204,934 barrels as compared with 199,779 barrels exported in February 1934. Total exports during July-February were 2,279,000 as compared with 2,006,000 barrels for the same period of 1933-34.

Canadian grain stocks

Total stocks of wheat in Canada on March 31, 1935, were placed at 282,675,000 bushels, or 7 percent lower than on the corresponding date of 1934 and 10 percent under 1933 stocks, according to the Dominion Bureau of Statistics. Barley and flaxseed stocks were also below those of 1934, but rye and oats stocks showed a slight increase. Out of the total 1934 wheat crop of 275,849,000 bushels, 40,460,000 bushels, or 22 percent, remained on farms as of March 31. This included seed for spring sowings. In 1934 and 1933, the comparable figures were 72,145,000 and 82,627,000 bushels, respectively. About 3,571,000 bushels of the 1934 crop were considered too poor to be marketed, which was a slightly higher percentage than was reported in the previous season. Wheat from the 1934 crop used for feeding livestock or poultry, also showed an increase, being tentatively estimated at 18,913,000 bushels, or about 1 percent above the 1933 wheat so used.



## CROP AND MARKET PROSPECTS, CONT'D

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## Rye and maslin in the Danube Basin

The acreage sown to winter rye and maslin in the Danube Basin is still placed at about 3,818,000 acres, according to the March report of the Belgrade office of the Foreign Agricultural Service. This compares with 3,773,000 acres sown for the 1934 crop and a five-year average for 1929-33 of 3,862,000 acres. The plants came through the winter in good condition, with little or no damage resulting from the frosts and snow storms of early March. Excessive moisture delayed spring seedings, but these represent only a small part of the total rye and maslin acreage in the Basin.

The 1934-35 exportable surplus of rye and maslin in the Danubian countries was estimated by the Belgrade office at 2,362,000 bushels. Of this, about 1,272,000 bushels were exported from July 1, 1934, to March 31, 1935, or about 54 percent, leaving on April 1 an unexported balance of 1,090,000 bushels, of which 992,000 bushels were in Hungary and 98,000 in Yugoslavia. Exports from the former amounted to 976,000 bushels during the first nine months of the current season, the greater part of which was shipped during the latter half of 1934 and went to Austria. Early in 1935 prices became too high to make Hungarian supplies attractive to Austrian purchasers, who consequently gave preference to Polish and Baltic rye. April shipments to Austria are expected to show an increase, however, when stocks are no longer plentiful in Poland and the Baltic countries. Likewise it is expected that the surplus in Yugoslavia will be taken by Austria before the end of the current season. Preparations for spring field work, combined with bad roads, accounted for slow deliveries during March. Prices remained unchanged in the Danubian countries except Hungary, where a marked decline followed Austria's unwillingness to make purchases at prices so much above world parity.

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## FEED GRAINS

Summary of recent feed grain information

The area sown to winter barley for the 1935 harvest in Yugoslavia is estimated at 593,000 acres, which is 0.5 percent below the acreage of 1934, and the smallest since 1928. The winter acreage of barley in Yugoslavia amounts to between 50 and 60 percent of the total.

The 1935 barley acreage in the countries reported to date amounts to 23,008,000 acres, an increase of nearly 27 percent over that of the same countries in 1934. The oats acreage in the countries reported totals

## CROP AND MARKET PROSPECTS, CONT'D

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43,352,000 acres, an increase of nearly 25 percent over that of the same countries for the preceding year.

Stocks of barley in Canada at the end of March were reported at 22,763,000 bushels compared with 24,225,000 bushels on the same date last year. Stocks of oats, expressed in terms of 32-pound bushels, amounted to 120,259,000 bushels against 114,240,000 bushels on March 31, 1934.

The Danubian situation

Winter barley and oats in the Danube Basin have mostly met with favorable weather conditions and there has been little frost damage, according to a report from the Danube Basin office of the Foreign Agricultural Service. It is expected that a normal spring feed grain acreage will be sown this year, probably somewhat below the 1934 seedings. In some sections of Bulgaria and Rumania, where a shortage of seed-corn was feared, the governments have distributed seed from surplus sections. In Hungary the government continued to distribute early ripening, improved corn to farmers at the price of common corn.

As a result of small 1934 wheat crops in Rumania and Bulgaria, increased hog feeding in Hungary, and aids to Rumanian farmers in paying their debts, domestic corn consumption during the winter exceeded expectations. The Danube Basin office now estimates the exportable surplus of corn for the 1934-35 season at 60,200,000 bushels, of which 35,700,000 bushels were still available after April 1. The anticipation of a large surplus from the new Argentine corn crop is expected to result in considerable pressure upon European markets, and it will probably be difficult to market all of the Danubian corn surpluses, although prices have decreased in Rumania and Yugoslavia.

The exportable surplus of Danubian barley for 1934-35 is now estimated at 17,200,000 bushels, of which 7,400,000 bushels were still available after April 1. As a result of considerable debt reductions in Rumania, farmers are not now compelled to sell their entire barley surplus, and have used some of it to increase their livestock, for which export markets have been opened in the Near East.

The estimate of the 1934-35 exportable surplus of oats in the Basin has been reduced to 1,400,000 bushels, of which 500,000 bushels were still available after April 1. A general increase in feed grain exports is expected in May, when spring field work is completed.



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Rumania now has barter agreements with Austria, Czechoslovakia, and Germany, on the basis of which corn and barley sales are made in exchange for industrial goods. Yugoslavia has similar agreements with the same countries and with Switzerland. A four-year plan has been signed which provides for the development of the exchange of commodities between Czechoslovakia, Rumania, and Yugoslavia. It is reported that the Bulgarian Government has prepared a five-year plan for the reduction of grain plantings to make way for an increase in orchards and industrial crops.

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## COTTON

Japan taking less American cotton

Imports of American cotton into Japan declined during February but were slightly larger than in February 1934, while imports of Indian cotton increased and were larger than in February 1934, according to information received from the Shanghai office of the Foreign Agricultural Service, quoting Consul Donovan at Kobe. Price parity was unchanged during the month and continued to favor Indian cotton. Visible raw cotton stocks in Japan continued to increase. Sales of American cotton to mills during February were 80,000 to 90,000 bales as compared with 75,000 to 100,000 bales reported for January. Spinners bought about 50,000 bales less cotton than they consumed during the month. In the aggregate the spinners had sufficient cotton to carry them into the first ten days of June, or 2 1/2 months in excess of their piece goods and yarn commitments.

Yarn production in February was about the same as in January but well above the output in February 1934, the figures being approximately 306,000 bales of 400 pounds in February and January 1935, and 274,000 bales in February, 1934. Mills were estimated to have been losing on coarse yarns and standard 20's. On higher count yarns prices were at levels ranging from a small loss on medium counts to 25 yen per bale of 400 pounds, equivalent to a little over \$7.00 United States currency. Production of medium and fine counts increased in February compared with January. Mills were sold out in yarn to the end of April and in piece goods to about March 25, which represents a decline in forward position. Export demand for piece goods was slow but production was well maintained. Exports amounted to 227,165,000 square yards for February 1935, compared with 205,834,000 during January 1935, and 204,628,000 square yards during February 1934. See tables, page 424.

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HOPSContinued increase in world production of hops

Including rough estimates for production in countries for which statistics have not as yet been received, the 1934 world hop crop, exclusive of Russia, is estimated at 120,000,000 pounds which is a 13.2 percent increase over the 1933 crop of 106,000,000 pounds. The current production, although 28.2 percent smaller than the record output of 1929, is substantially greater than the 1931 crop of 104,000,000 pounds and approximates the 129,000,000 pounds produced in 1930. This increase in total production is to be attributed partly to the expansion in the cultivation of hops. The area under the crop, which declined considerably from 1929 to 1932, increased in 1933 and 1934, particularly in the United States.

The weather conditions of 1934 in some countries were favorable to the development of the hop crop so that the average yield for the world reached 968 pounds per acre and exceeded those of the last four years. The decline in production for Germany is due to drought which began about the middle of March and continued for several months. The young 1933 plants and particularly the 1934 ones suffered much under the exceeding dryness. See table, page 425.

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FRUITS, VEGETABLES, AND NUTSFrost damages English fruit; citrus market improved

English plums and cherries were damaged by frost to an undetermined extent during the week ended April 11, according to information from the London Office of the Foreign Agricultural Service. Bush fruit was also damaged. So far apples and pears appeared to be uninjured. Apples are generally showing a good average bud. Where the important Bramley's Seedling and Newtown Wonder varieties were heavy last year, the set this year promises to be lighter. The season in general is expected to be early. Rain and high winds have been prevalent during April.

Of interest to American exporters is the fact that the fruit marketing scheme proposed by the National Farmers' Union of the United Kingdom, which would have placed imports under the control of the industry, was defeated by a good majority. All sections of the industry were opposed. This does not mean that a modified scheme may not be adopted.

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later; however, had the proposed plan been accepted, it is probable that American apples at least, and possibly other fruits, could not have entered the United Kingdom in any volume until after January 1. Opposition to the scheme probably was accentuated by the failure of the potato marketing scheme to raise prices.

Supplies of citrus fruit in British markets were lighter during the week ended April 11. As a result, the market strengthened and prices were higher at the auctions with a better tone evident all around. Grapefruit and lemons were in generally good condition. Oranges from Spain were spotty; some lots were good and brought very high prices, others were dry and generally unsatisfactory. Good, juicy, Spanish oranges made as much as \$9.19 a half case of 110 pounds, but most Spanish oranges ruled at from \$3.02 to \$3.45 a half case. Spanish citrus is not expected to be as plentiful from now on as in recent years, due to the damage done to the crop by the February freeze. Reports indicate that the last of the Palestine citrus is afloat.

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## LIVESTOCK, MEAT, AND WOOL

German and Danish hog numbers decreased

Hog numbers in both Germany and Denmark have been reduced during the past year. The total number of hogs on hand in Germany in early March was recently estimated to be 9 percent less than a year earlier. Decreases were reported in nearly all classes of hogs. In view of this reduction in numbers it is expected that hog slaughter in Germany during the remainder of 1935 will be somewhat smaller than last year. Inspected slaughter in that country in 1934 was larger than in 1933 or 1932 but less than the record slaughter of 1931. In Denmark the number of hogs on March 1, 1935 was estimated to be 7 percent smaller than a year earlier. Increases were reported, however, in the number of bred sows and young pigs. It is likely, therefore, that the decrease in Danish hog production which began in 1933 will be checked during the present year. Hog slaughter in Denmark in 1934 was much below that of other recent years.

Inspected slaughter of hogs in the United States in March was much smaller than a year earlier and was the second smallest on record for that month. Domestic hog prices declined moderately from the high level reached in early March, but this decline was of short duration and prices again advanced in late March and early April.

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BREAD GRAIN CONSUMPTION AND TRADE IN BRITISH ISLES a/

The British Isles constitute the premier wheat import market of the world. The wheat importations into these countries represent more than a third of the total world movement in that grain. Great Britain and Ireland together have an area of 112,543 square miles (about the size of Arizona) and a population of approximately 50,000,000. Wheat is almost exclusively the grain used in the production of the bread consumed. Several centuries ago the principal bread grain used was rye, but now only an insignificant percentage of the total amount of bread consumed is made from this grain.

Wheat production

Wheat production in the British Isles amounts to less than one-fifth of the domestic requirement. These islands, however, are well suited for the production of wheat. This fact is reflected in the high yields per acre, which average more than double those obtained in the United States. Drought, which is one of the most potent causes of crop failures in most wheat-growing countries, is never responsible for wheat crop failures in the British Isles. On the contrary, the best yields occur in the drier seasons. Another favorable circumstance, which is possibly associated with climatic conditions, is the general healthiness of the crop. Disastrous epidemics of disease are outside the experience of the present generation of wheat-growers; and, although pathologists are aware of the occurrence of disease, the proportion of wheat thus affected is so small that very many growers do not recognize its presence. The most they will admit is that they suffer from "a bit of blight" - a term covering everything from nitrogen starvation to yellow rust. Frost as experienced in the United States causes very little loss.

Although wheat production may be very satisfactory from the standpoint of growth and yield, there are, however, certain other important factors which do not favor its production. The smallness of the operations which do not permit the use of the most efficient means of harvesting and handling makes for high production costs. The occurrence of wet weather at harvest time necessitating extra handling or artificial means of drying also often adds considerably to the cost of production and sometimes has a damaging effect on the condition of the grain. Last, but not least of the factors unfavorable to wheat production, are the poor baking quality and comparatively high moisture content of these wheats, which usually cause them to have a lower commercial value on the domestic markets than do foreign wheats.

Because of the relative coolness of the summers, the period required for the growing of wheat in the British Isles is much longer than in the

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a/ By J. H. Shollenberger, Grain Specialist, Foreign Agricultural Service. Based on studies made in the British Isles. This article covers England, Wales, Scotland, and all of Ireland.

## BREAD GRAIN CONSUMPTION AND TRADE IN BRITISH ISLES, CONT'D

majority of wheat countries. Wheat sown in the autumn is usually in the ground eight months before coming into flower. It may, however, be sown until the middle of February with a reasonable chance of securing a crop. Apart from the fact that the farmers prefer to get as much as possible of their work of planting done during the autumn months, the chief disadvantage against spring sowing is that weather and soil conditions are usually less favorable for seeding, and yields are less satisfactory. As a consequence, the amount of spring sowing is relatively small.

Harvesting begins in August, and, due to the wetness of the climate, is often a somewhat difficult and expensive operation. Sometimes artificial means have to be employed for drying the grain, so that it may be put in suitable condition for stacking. The use of combine machines for cutting and threshing wheat in Britain is only in the experimental stage, and is not likely to be adopted to any very great extent, for the reason that wheat fields are relatively small and weather conditions generally unfavorable for the efficient operation of these machines. Only a small percentage of the wheat is threshed at harvest time. Most of it is stacked in the field and threshed during the autumn months. Very little unthreshed grain is stored in barns or sheds. Many of the stacks are provided with a thatched covering made of straw. Usually threshing does not take place until the farmer wants to market his grain.

Wheat production in the British Isles during the prewar period 1909-1913 averaged 59,640,000 bushels per annum. (See table, page 423.) During the postwar period 1924-1929 annual production averaged 53,572,000 bushels and during the 1929-1933 period 48,348,000 bushels. It would appear from the latter two averages that production is not only lower than in prewar times but that its trend is downward. This downward trend, however, stopped in 1931 when production reached the low point of 38,594,000 bushels. Since then there has been a definite trend upward, reaching in 1934 to 73,126,000 bushels.

The increases in production which occurred in the 1932, 1933, and 1934 crops were partly due to increased yield per acre on account of exceptional weather conditions and partly to an increase in acreage as the result of the Wheat Act of 1932 guaranteeing to the English farmer a price of ten shillings per 112 pounds (par value about \$1.30 per bushel) for any wheat of millable quality produced up to a total of 50,000,000 bushels. Unless this limitation is raised, it is not expected that wheat production in the British Isles will increase beyond the 1934 level. Rye production is of no significance, seldom amounting to more than 50,000 bushels a year.



## BREAD GRAIN CONSUMPTION AND TRADE IN BRITISH ISLES, CONT'D

Imports and exports

During the five-year period 1929-1933 annual imports of wheat into the British Isles averaged 216,449,000 bushels and of wheat flour (in terms of wheat) 32,697,000 bushels. Compared with similar data for the prewar period 1909-1913, these imports represent increases of 12.5 and 20.6 percent, respectively.

Although no material change in flour imports is indicated by comparison of the annual averages for the 1924-1928 and 1929-1933 periods, nevertheless, beginning in 1932 there was a decided drop in flour imports. Because of the placing in that year of a duty on imports of non-Empire flour and because British millers are now prepared to mill Canadian and Australian wheat in order to meet the competition of Canadian and Australian flour, this drop is likely to continue even further in future years.

Exports from the British Isles include both wheat and flour. The wheat exports consist only of reexports of foreign wheat, and, therefore, are of no significance. On the other hand, the flour exports, although milled from foreign wheat, nevertheless are of significant importance, for the reason that this flour is a product of British mills. During the 1909-1913 period, flour exports averaged in terms of wheat 3,736,000 bushels yearly. During the 1924-1928 period, the yearly average was nearly 13,000,000 bushels, or more than three times as great as in the prewar period, but in the succeeding five-year period (1929-1933) exports of flour showed some tendency to decrease, especially beginning with the 1932 crop year.

Data on rye imports and exports are not available for the prewar period. Those which are available, however, for the postwar period show that the foreign trade of the British Isles in this grain amounts to very little. Imports during the 1924-1928 period averaged only 945,000 bushels yearly and during 1929-1933 only 243,000 bushels. With respect to rye exports, these have been much less than imports, amounting to only a few thousand bushels.

Domestic wheat characteristics

The wheats produced in the British Isles are, as a general rule, very soft in texture and very weak in quality. The gluten in these wheats is not only low in content but is also of poor quality, unsuited for bread making purposes but ideal for biscuit flours. Common wheats of both spring and winter habits are grown. Club wheats are produced but not to any considerable extent. No Durum wheats are produced. Red and White Common wheats of winter habit and Red Common wheats of spring habit predominate.

## BREAD GRAIN CONSUMPTION AND TRADE IN BRITISH ISLES, CONT'D

Owing to the damp climate, the moisture content of domestic wheats averages from 16 to 20 percent. Because of this fact and the further fact that these wheats are of very soft texture, there is usually an appreciable portion of the crop which is damaged from sprouting, fermenting, or the development of moulds to such an extent that it is unfit for milling. Except in the production of special biscuit flours, British millers do not use much domestic wheat for milling purposes. A large proportion of the domestic crop is utilized for feed, particularly for poultry feed, for which purpose it is preferred to foreign wheat on account of its softness.

For a number of years British agricultural experiment stations have endeavored to improve the domestic wheats. Their chief aim has been to develop varieties in which stiffness of straw and high yielding properties are combined with good baking quality. Some progress has been made in this direction, but the quality of the best English wheats thus far produced still falls short of the standards desired. Some improvement in quality has been accomplished through the elimination of questionable varieties, and the distribution of better varieties.

Among the varieties which have been recommended for autumn sowing are Wilhelmina, Yoeman, Little Joss, Iron III, Weibull's Standard, Rivett, and Squarehead's Master. The recommended varieties for spring sowing include Little Joss, A-1, April Bearded, and Red Marvel (or Japhet). All the varieties mentioned are red in color except Wilhelmina, which is white. From the standpoint of acreage planted, it is reported from official sources that Squarehead's Master is the most important variety. It accounts for about one-fifth of the total wheat acreage. Little Joss and Victor are the next highest in acreage planted. Yoeman is outstandingly the best in baking quality and about the only one that is at all suitable for bread making. Of the spring wheats produced, Red Marvel accounts for most of the acreage.

Government regulations affecting the grain and  
milling industries

From the repeal of the Corn Laws in 1846 until 1932 the British Isles were on a free trade basis as regards grain. Furthermore, during that period neither direct nor indirect subventions were granted for the purpose of strengthening the competitive position of British farmers in the home market. In 1932 two very important pieces of legislation became effective; namely, the Wheat Act and the Ottawa Agreements.

The Wheat Act, which became a law May 12, 1932, guaranteed to producers a minimum price of 10 shillings per hundredweight (about \$1.30 per bushel at par) and imposed upon millers and importers of flour the obligation of making "quota payments" into a special fund for maintaining

## BREAD GRAIN CONSUMPTION AND TRADE IN BRITISH ISLES, CONT'D

the price guaranty. The guaranteed minimum price began with the 1932 crop, applied only to millable wheat, and was limited to 50,400,000 bushels. On June 17 an order became effective requiring every miller and exporter of flour to make, to the commission set up to administer the Wheat Act, a quota payment of 2 shillings 3 pence per sack of 280 pounds of his output of flour. The amount of this payment has been changed several times since, but only slightly.

Under the terms of the Ottawa Agreements which became effective in November 1932, a duty of 2 shillings per quarter of 480 pounds (about 6 cents per bushel) was imposed by the United Kingdom on imported non-Empire wheat and a 10 percent ad valorem duty on non-Empire flour. Another feature of these Agreements which was harmful to United States grain interests was the stipulation that imports of Empire wheat in order to be eligible for free entry into the United Kingdom must be accompanied by a certificate of origin and a through bill of lading from the country of production in support thereof. This requirement was practically a death blow to the practice of transshipment of Canadian wheat through the United States to the United Kingdom.

As concerns the Irish Free State, legislation was enacted July 6, 1932, to encourage the expansion of the domestic milling industry to a point sufficient to take care of domestic needs. One form of encouragement given was the placing of a duty of 5 shillings per sack of 280 pounds on imports of flour. The Agricultural Produce (Cereals) Act of 1933 abolished this duty but prohibited the import of flour except by license. Another governmental regulation affecting the milling industry is the compulsory use of a certain percentage of domestic wheat. The normal consumption of flour in the Irish Free State amounts to 4,250,000 barrels. In 1933 flour imports amounted to approximately 800,000 barrels, but in 1934 fell to less than 500,000 barrels. This reduction in imports has been made possible by the governmental protection and assistance given to the domestic milling industry. In the course of another year or two, it is expected that the Irish Free State milling capacity will be able to produce the full requirement of flour.

Milling and wheat mixing practices

The milling industry of the British Isles is largely concentrated in a few milling concerns. According to information published in 1931, at that time four milling companies handled about 67.5 percent of the wheat from all sources ground in Great Britain and Ireland. The remaining 32.5 percent was handled by scattered small mills. At the time that this information was published, it was expected that an 80 percent concentration of the milling industry of the British Isles would be realized at some future date. Subsequent developments in the industry have brought this



## BREAD GRAIN CONSUMPTION AND TRADE IN BRITISH ISLES, CONT'D

prediction nearly to realization. Some of the big concerns have increased their capacity either by the purchase of other existing plants or by the erection of new plants.

Because of the fact that the British Isles constitute the world's greatest importer of wheat, this concentration of so much British flour milling into the hands of a few concerns is an important factor in the world wheat demand situation. The wheat requirements and purchasing power of these few (three or four) concerns constitute such a large portion of the total British foreign trade in wheat as to give them considerable bargaining advantage over exporters who are dependent upon the British market for the disposal of their stocks of wheat. This is particularly true in times of heavy export supplies.

Besides the concentration, another development of great importance has been the rationalization of the industry. It is reported that as far back as 1913 a movement was started by the leaders of the industry to come to an agreement whereby some of the more serious competitive practices would be checked and the industry placed on a paying basis. Not until September 1929, however, did this movement succeed. The scheme has been under the control of what is known as the Millers' Mutual Association, the avowed purpose of which is to reduce costs of flour manufacture and distribution by improved organization of the industry.

One method employed under this scheme to reduce costs has been the purchase and closing up of redundant mills. The money required for this purpose was obtained through assessments levied on the individual members of the Association. The elimination of these mills permitted the remaining mills to operate on a fuller time basis and consequently on a cheaper unit cost of production basis. It is claimed that no attempt was made to fix flour prices, but, nevertheless, the overlapping of sales territories and other uneconomic trade practices were eliminated, which in effect reduced price competition. One of the agreements entered into was that member mills would not buy any foreign flour. This no doubt has tended to reduce the importation of high-strength flours, because in former years some of the mills followed the practice of buying such flours for blending with their own product.

It can be definitely said that since the rationalization scheme has been put into effect the British milling industry has been on a sounder financial basis than it was previously. This is evidenced by the published annual financial statements of the milling companies and by increased dividends paid to stockholders in recent years.

The commercial mills of the British Isles, almost without exception, are of the modern roller system type and the great bulk of the milling is

## BREAD GRAIN CONSUMPTION AND TRADE IN BRITISH ISLES, CONT'D

done in mills of 1,000 or more barrels of flour capacity per twenty-four hours. Because the mills of the United Kingdom and Irish Free State are so largely dependent upon foreign wheat for their supplies for milling purposes, practically all the mills of any commercial importance are located at some port or on some water way connected with a port. The principal milling centers in the United Kingdom, in the order of their importance, are Liverpool (including nearby Mersey-side towns), London, Hull, Cardiff, Edinburgh, Glasgow, Bristol, Newcastle, and Belfast. Manchester until the last few years was also an important milling center. In the Irish Free State, Dublin, Cork, and Limerick are the chief milling centers.

Most British mills employ up-to-date equipment and methods of operation. Some of the mills are quite new and most of the others are in good repair. The total grinding capacity of British mills is more than sufficient for domestic requirements.

The grain storage accommodations at British mills are generally very limited, in some instances sufficient only for a few days' supply of grain. Other stocks of grain, however, are carried by these mills in port elevators and warehouses and in barges. These stocks usually are much larger than the mill stocks and move to the mill only as needed. When the different kinds of wheat arrive at the mill they are generally binned separately, except that wheats which require similar conditioning treatment are sometimes mixed together in the proportions in which they will be used in the milling mixture and then binned.

In the preparation of wheat for grinding, the British miller usually employs a considerably more elaborate system than does the American miller. All wheats before binning are given a rough cleaning. In the case of the drier types of wheats, frequently a small quantity of water is added before these are binned. Prior to milling, the various wheats which are to be included in the milling mixture are given a thorough cleaning by means of washers, stoners, scourers, screening machines, aspirators, and cockle, oats, and spiral separators. The washing of the wheat is one of the last steps in the cleaning process and usually the first in the conditioning and tempering process. This latter process may include drying, heating, further dampening, and storing. One of the important functions of conditioning and tempering is to control the moisture content of the wheat at the time of grinding. In British mills wheat usually goes to first break rolls with a moisture content between 16 and 17 percent, but in some instances it may be as high as 18 percent. The flour produced from these mills usually contains between 15 and 16 percent moisture.

It is the general practice to grind together rather than separately the various wheats which are used in the production of a British commercial flour. The mixing takes place, however, usually in piece-meal fashion. Wheats of dissimilar texture and moisture content are washed and conditioned



## BREAD GRAIN CONSUMPTION AND TRADE IN BRITISH ISLES, CONT'D

separately, which means that the mixing of all the wheats used frequently is not completed until just before grinding.

The outstanding differences between the British and American methods of milling are as follows: British millers use a much greater amount of grinding surface. The amount used is reported by one authority as being about 100 inches of linear surface per sack (280 pounds) of flour grinding capacity per hour, which is equivalent to 2.92 inches per barrel of flour grinding capacity per twenty-four hours. The rolls in the roller mills are placed on a diagonal rather than a horizontal plane, and are much heavier and longer than American rolls; also they revolve at slower speeds than American rolls. The break rolls usually are five feet in length and ten inches in diameter. Sifters are not used as extensively as in America. Their use is confined almost exclusively to break stocks. Centrifugal reels are used on reduction stocks. British millers use a more extensive system of middlings purification than do American millers.

British mills produce four general classes of flour, namely, bread flour, pastry and cake flour, biscuit flour, and household flour, the latter either plain or of the self-rising kind. The bread flour is produced from a mixture of foreign wheats of medium to strong gluten quality. Biscuit flour is almost wholly produced from English wheats. Household and cake flours are produced generally from soft wheats, either foreign or domestic. A considerable proportion of the household flour produced is of the self-rising kind. The following are names used in designating the various milling grades of flour produced: Short Patent, Long Patent, Baker's, Low Grade, and Straight. No "Red Dog" grade of flour is produced. British flour extractions average about 71 percent. It is the general practice among British millers to bleach their flour.

Routine chemical tests do not play as important a role in the operation of British mills as in American mills. Protein content is not considered a reliable index to quality; more reliance is placed in gluten tests. Ash content determinations are made for the millers' guidance in making flour separations, but are of very little importance in connection with the sale of flour to the baker.

On account of the large foreign trade of the British Isles, shipping lines radiate from its numerous excellent ports to all parts of the world. Because of this fact, together with the further fact that the area represented by these islands is by far the world's greatest importer of wheat, the wheats of all the important exporting countries are offered for sale in these islands.

British millers buy their wheat principally in London. "The Baltic Exchange" being the center of the cargo and large parcel trade and the "Mark Lane Exchange," the center of the small trade in parcels from 1,000 to 5,000 quarters each. Millers in other parts of the British Isles either maintain offices in London or are represented there. Liverpool is

## BREAD GRAIN CONSUMPTION AND TRADE IN BRITISH ISLES, CONT'D

preeminently the grain "futures" market and is also an important cargo market. Purchases of foreign grain in the British Isles, and to a considerable extent in many continental European countries, are made on London Corn Trade Association contract forms.

In his endeavor to produce flour of a quality suitable for the trade which he serves, the British miller undoubtedly is just as particular as the miller in other countries. Because of the larger number of different kinds and qualities of wheats usually available for his use, however, which makes it possible for him to produce flour of the desired quality from a number of different combinations of wheat, he is likely to give more consideration to price. Owing to the necessity for using foreign wheats almost to the full extent of his milling requirements, the British miller through circumstances over which he has little or no control is frequently compelled to change his mixture. This has given him valuable experience and a knowledge of the milling and baking characteristics of many foreign wheats, with the result that he has become most skillful in the blending of wheats to produce flour of the desired quality. Thus, he is enabled to take advantage of price differences between the various foreign wheats, to which millers in other countries dare not give consideration.

Types of wheat required

Quality requirements differ somewhat between the various sections of the British Isles. In the production of bread flour in England and Wales, United States Hard Winter wheats come nearest to fulfilling the qualifications desired, and until the last few years a very considerable quantity of these wheats was used by the millers of this area. These wheats, however, were seldom if ever used alone, but were employed as "fillers" a/ in the milling mixture. Other "filler" wheats which are used are Argentine and medium strength Russian wheats. Besides the one or two "filler" wheats contained in an English miller's mixture, there are also strong and some weak wheats. Strong wheats include Canadian Manitobas, and the better quality Russian and United States Hard wheats. Weak wheats include English, western and central European, Danubian, Indian, and Australian wheats. Durum wheat is sometimes also included in mill mixtures as a weak wheat, but never to any appreciable percentage. The weak wheats are selected because of their relatively lower price and because of certain properties other than gluten strength, such as flour yield, color, and high gassing power. The strong wheats are selected to offset any strength deficiencies in the other wheats in the mixture.

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a/ A "Filler" is a wheat that neither helps to carry a weak wheat nor itself requires support from the strong components in the mixture.

## BREAD GRAIN CONSUMPTION AND TRADE IN BRITISH ISLES, CONT'D

In Scotland stronger wheats are demanded for bread flours than in England. The wheats used in the production of these flours must consist of practically all Canadian or strong American wheats. In the case of cake and pastry flour production in Scotland, United States Soft Red Winter wheats formerly were used, but in recent years Australian and continental European wheats have usurped their place.

In Ireland the quality of flour required for the production of commercial breads is somewhat the same as in Scotland. In rural districts and villages of Ireland much of the bread consumed is made in the home. For this bread a soft weak flour made from white wheat is required. Formerly United States Pacific Coast white wheats of the softer types were preferred, but in recent years these have been largely replaced by Australian white wheats. One of the chief reasons for white wheats being preferred to soft red wheats is that Irish feeders are willing to pay a higher price for the offals from the former than from the latter.

The November 1932 duty of 2 shillings per quarter of 480 pounds (approximately 6 cents per bushel at par) placed on imports of non-British wheat into the United Kingdom has increased the use of Canadian and Australian wheats, but has not as yet entirely eliminated foreign wheats from the United Kingdom market, nor is it likely that it ever will, at least not until world production and world stocks are more nearly consistent with world needs. The large supplies of wheat in the world during the past few years have forced certain non-British surplus-producing countries to prefer their wheats on the United Kingdom market at prices under their ordinary relative market value in comparison with Canadian and Australian wheats so that a market might be found for them. Should the world supplies of wheat be reduced in future years to a point in harmony with or below world requirements, then the importation of non-British wheats into the United Kingdom might possibly decline to practically zero because then these wheats would find a ready market elsewhere at prices which would not have to offset any duty discrimination.

Canadian wheat is available at all seasons of the year and is present in all British bread wheat milling mixtures. Most other wheats are available only at certain seasons of the year and some years may not even be available at all. Fortunately, however, certain of these wheats are interchangeable. This, together with the fact that the season of availability varies for the different wheats, not only enables the British miller to vary the composition of his milling mixture to take advantage of price fluctuations without changing the quality of his flour, but also necessitates certain changes at different seasons of the year. The usual months of the year when the various wheats become available on British markets are as follows:



## BREAD GRAIN CONSUMPTION AND TRADE IN BRITISH ISLES, CONT'D

February to March - Argentine and Australian,

June - Iranian (Persian)

July - Indian,

August - United States Soft Winter,

September - United States Hard Winter and Pacific Coast  
white wheats, Danubian, Balkan, Russian,  
and English,

October - Canadian Hard Red Spring.

The following data published by the National Joint Industrial Council for the Flour Milling Industry give the approximate proportions of wheat of different origins in British milling mixtures during the three years 1928, 1929, and 1930. These proportions are based on the total quantities of the various wheats used throughout the year and do not represent actual milling mixtures.

Approximate proportions of wheat of different origins milled by British millers for the three years 1928, 1929, and 1930

Origin	1928	1929	1930
	<u>Percent</u>	<u>Percent</u>	<u>Percent</u>
Canadian .....	38.5	29.8	22.7
Australian .....	8.5	10.1	11.0
Indian .....	1.3	0.1	2.9
English .....	14.6	11.5	9.1
Russian .....	-	-	16.4
United States .....	14.8	9.3	18.2
Argentine .....	20.1	36.0	13.2
Other wheats.....	2.2	3.2	6.5
	100.0	100.0	100.0

Baking practices

Except in rural Ireland and in certain sections of northern England, nearly all of the bread consumed in the British Isles is baked in commercial shops and bread bakeries. Only in the excepted districts is home baking practiced to any considerable extent. Commercial baking is a highly developed industry, and, although bakeries of the factory type are found

## BREAD GRAIN CONSUMPTION AND TRADE IN BRITISH ISLES, CONT'D

in all the cities, bakeries of the shop type are still quite numerous. It is reported that just prior to the war these latter were going out of business in the face of competition from large factory bakeries. This process, however, was arrested during the war and has since been in abeyance mainly through the action of local associations of bakers.

The technique of baking employed in the factory bakeries is very modern. Usually a chemist is employed who is competent to test and mix the various flours before using and to prescribe the proper procedure in baking to produce the results desired. The equipment used is similar to that used in American bakeries except for the mixers which are of the slow speed bowl type.

In some sections millers operate bakeries in order to provide a regular outlet for the products of their mills. Similarly, the Cooperative Wholesale Milling Society, which mills nearly a quarter of the flour used in the British Isles, maintains a working relationship with retail cooperative societies operating bakeries whereby the latter may take all or a certain proportion of their flour requirements from the former. In considering the British baking industry, mention should be made of that branch of it concerned with the manufacture of biscuits. By biscuits is meant small sweet cakes and sweet crackers. Crackers of the soda and saltine type are not produced in the British Isles.

The consumption of biscuits has reached considerable importance in the British Isles, chiefly in connection with the afternoon tea drinking habit. According to Census of Production Statistics the production of biscuits in the United Kingdom amounted to 3,370,000 hundredweights (177,440,000 pounds) in 1930, which represents an increase of from 24 to 27 percent over 1924 production. Spacious factories for the manufacture of biscuits are located in London, Reading, Birmingham, Manchester, Liverpool, Carlisle, Glasgow, Edinburgh, Dublin, and other cities. These factories use up-to-date methods and equipment, in that respect being as fine as can be found anywhere else in the world.

In the production of the common commercial bread in the British Isles, the baking formula generally used, on the basis of a 280-pound sack of flour, is as follows: About 140 pounds of water, 2.5 pounds of yeast, 3.5 pounds of salt, and 1 pound of malt extract or malt, sometimes together with some other form of bread improver. A sack (280 pounds) of flour is expected to yield, on the average, 384 pounds of bread, but yields of 400 pounds of bread are not uncommon. Sugar, lard, and milk are used only in the production of certain special or fancy breads. Formerly the long process method of baking, involving the preparation of a sponge and dough, was used everywhere throughout the British Isles. It still persists in some parts, especially in Scotland, but elsewhere in recent years it has been superseded by the shorter straight-dough method.



## BREAD GRAIN CONSUMPTION AND TRADE IN BRITISH ISLES, CONT'D

In England and Wales bread is chiefly pan baked (called timed loaves). Formerly most of the bread was hearth baked. In Scotland much of the bread is baked on the oven draw plate in close formation so that no side crust will be produced except on the border loaves. The most usual size of loaf produced is the two-pound loaf. In the case of English bread this two-pound loaf has an average volume of approximately 2,500 c.c., or about the size of an American one-pound loaf. The Scottish two-pound loaf is appreciably larger than the English loaf.

English bread has a very close-grained, compact interior and a tough crust. It has a moist crumb. Scottish bread is lighter in texture, slightly less moist, and its crust is not so tough. Irish commercial breads are similar to Scottish breads in quality characteristics. The home baked breads in Ireland, which account for 50 percent or more of total bread production, are of the soda biscuit type so popular in the Southern States of the United States. To make this bread the Irish housewife mixes her flour with buttermilk and a pinch of bicarbonate of soda. The dough or batter made from the mixing of these ingredients together is put into a three-legged, round, wrought-iron pot of about twelve inches diameter. A lid is placed on the pot, which is then set amongst the turf briquets in a turf oven for baking. Baking usually takes from 30 to 40 minutes. The Irish housewife is very particular about the quality of her bread. A white, tender, or soft crumb is desired.

The practice of wrapping bread before sale has not as yet become nearly so prevalent as in the United States, but is increasing. Some attempts have been made to sell sliced bread, but thus far this type of loaf has not taken well with the British consumer.

In the distribution of his bread, the small shop baker deals direct with the consumer, who either makes his purchase at the shop or at home from the "roundsman" (baker's salesman), who calls at his door. The large factory baker either sells his bread in wholesale quantities to retailers or else maintains "confectionery" shops, cafes, and similar retail establishments for the sale of bread, cakes, and confectionery.

Bread in some form plays an important role in the dietary habits of the people of the British Isles. It is served and forms an important part of each meal. The breads consumed are almost exclusively made from wheat flour. Very little of the bread is made from rye flour. The well established habit among British people of drinking tea in the afternoon accounts for a considerable consumption of bread and other baking products made from wheat flour because bread sandwiches and sweet cakes are usually served generously with the tea.

## BREAD GRAIN CONSUMPTION AND TRADE IN BRITISH ISLES, CONT'D

WHEAT AND RYE: Acreage, production, yield, trade, and apparent utilization in the British Isles, averages 1909-1913, 1924-1933, annual 1929-1934

Year	Acreage	Production	Yield per acre	Imports a/		Exports a/	Apparent utilization b/	
				Wheat	Flour	Flour c/	Total	Per capita
	1,000 acres	1,000 bushels	Bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	Bushels
WHEAT								
Average:								
1909-1913	1,287	59,640	51.6	192,364	27,110	3,736	275,378	6.1
1924-1928	1,624	53,573	33.0	205,712	33,048	12,967	279,365	5.8
1929-1933	1,455	48,343	33.2	216,449	32,697	10,094	287,400	5.8
Annual:								
1929.....	1,414	50,942	36.0	194,365	36,252	10,847		
1930.....	1,432	43,350	30.5	212,605	37,301	10,064		
1931.....	1,371	38,594	30.4	241,997	35,312	12,294		
1932.....	1,364	44,445	32.6	219,905	25,683	10,138		
1933.....	1,794	64,407	35.9	213,371	28,939	7,125		
1934.....	1,263	73,568	57.5	-	-			
	Acreage	Production d/	Yield per acre	Imports e/		Exports e/	Apparent utilization b/	
	1,000 acres	1,000 bushels	Bushels	1,000 bushels		1,000 bushels	1,000 bushels	Bushels
RYE								
Average:								
1924-1928	57	1,233	21.6	945		108	2,070	.04
1929-1933	38	806	21.2	243		15	1,034	.02
Annual:								
1929.....	42	940	22.4	315		25		
1930.....	51	1,075	21.1	345		13		
1931.....	40	811	20.3	377		12		
1932.....	31	626	20.2	130		9		
1933.....	26	577	22.2	-		14		

Compiled by the Foreign Agricultural Service Division from official records and publications of the International Institute of Agriculture.

a/ Year beginning July 1. Reexports have been deducted from imports. Flour converted to grain on basis of 4.5 bushels per barrel. b/ Stocks at beginning and end of period disregarded. c/ No exports of wheat reported. d/ Production for Scotland reported for 1925 and 1930 only; other years estimated. e/ Calendar years 1924-1933; flour included converted to grain on basis of 6 bushels per barrel, United Kingdom only.

## JAPAN: Imports of cotton, February 1935, with comparisons

Month	American		Indian	
	1934	1935	1934	1935
	<u>Bales of 500 pounds</u>	<u>Bales of 500 pounds</u>	<u>Bales of 500 pounds</u>	<u>Bales of 500 pounds</u>
January .....	236,168	247,910	0	127,368
February .....	164,330	173,123	18,197	187,964

Office of the Foreign Agricultural Service, Shanghai.

## JAPAN: Stocks of American and Indian cotton in warehouses and sheds at Kobe, Yokohama, and Osaka, at end of February 1935, with comparisons

Month	American		Indian	
	1934	1935	1934	1935
	<u>Bales of 500 pounds</u>	<u>Bales of 500 pounds</u>	<u>Bales of 500 pounds</u>	<u>Bales of 500 pounds</u>
January .....	425,357	477,934	29,114	172,259
February .....	387,063	495,169	19,673	245,980

Office of the Foreign Agricultural Service, Shanghai.

## JAPAN: Cotton yarn production by counts, January and February 1935

Month	19 count and below	20 to 22 count	23 to 44 count	45 count and above	Total
	<u>Bales of 400 pounds</u>	<u>Bales of 400 pounds</u>	<u>Bales of 400 pounds</u>	<u>Bales of 400 pounds</u>	<u>Bales of 400 pounds</u>
January .....	84,544	98,086	113,948	9,807	306,385
February .....	80,523	93,881	120,409	10,753	305,571

Office of the Foreign Agricultural Service, Shanghai.

HOPS: Acreage and production in specified countries,  
1932 to 1934

Country	Acreage			Production		
	1932	1933	1934	1932	1933	1934
			a/			a/
	Acres	Acres	Acres	1,000 pounds	1,000 pounds	1,000 pounds
North America:						
Canada <u>b/</u> .....	690	924	-	791	1,477	-
United States <u>c/</u> .....	22,000	30,300	35,800	24,058	39,965	40,345
Europe:						
England and Wales.....	d/16,531	d/16,895	17,300	21,056	24,192	29,008
Belgium.....	1,416	1,475	2,170	1,531	1,580	3,871
France..	4,361	4,220	5,004	1,711	3,178	6,026
Germany.....	19,800	23,638	23,850	10,928	14,977	14,427
Austria.....	116	96	-	35	-	-
Czechoslovakia.....	23,631	25,370	27,000	16,583	12,915	15,478
Hungary.....	243	358	-	141	196	-
Yugoslavia.....	3,613	4,186	-	1,819	3,228	-
Rumania.....	72	52	-	33	21	-
Poland.....	4,875	5,424	7,000	3,436	2,541	-
Total European countries reporting acreage and production, all years.....	65,739	71,598	75,824	51,809	56,842	68,810
Oceania:						
Australia.....	952	726	-	) 1,669	1,654	-
New Zealand.....	355	510	-			
Total countries reporting acreage and production all years.....	87,739	101,898	111,624	75,867	96,807	109,155
Estimated world total, excluding Russia <u>e/</u>	98,655	114,000	124,000	83,792	106,000	120,000

Bureau of Agricultural Economics. Official sources and International Institute of Agriculture except as otherwise stated.

a/ Preliminary. b/ British Columbia. c/ Principal producing States. d/ These figures include the acreage left unpicked, which was estimated at 200 acres in 1932 and 20 acres in 1933. e/ Exclusive of acreage and production in minor producing countries for which no data are available.



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